



## California Automated Travel Expense Reimbursement System

### CalATERS GLOBAL

#### Privilege Request

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Privileges are required for department accounting staff with administrative responsibility for CalATERS Global. This includes department accounting staff who process and approve travel forms for payment, and help desk support staff who provide first-level support to department employees. Descriptions of the CalATERS Global privileges are provided below.

- **Work Pool** – Access to the Work Pool allows designated department accounting staff to process travel advance and expense reimbursement forms.
- **Travel Advance Administration** – Access to Travel Advance Administration allows designated department accounting staff to manually add new travel advances to CalATERS Global, update travel advances with payment information, apply partial repayments, and clear outstanding travel advances.
- **Log On As Read** – This privilege allows designated department staff to log into another user's work queue to assist with the use of CalATERS Global. Log on as Read provides read-only capability for viewing profile information and travel forms.
- **Log On As Write** – This privilege allows designated department staff to log into another user's work queue to assist with the use of CalATERS Global. Log on as Write provides the ability to view travel forms and update profile information.
- **CalATERS Global Reports** – Access to the CalATERS Global Reports system allows designated department staff to view and/or print CalATERS Global reports.



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#### Requesting Privilege Assignments

**Add (A)** - Add is used to assign privileges to department accounting staff who have not been previously assigned privileges.

**Modify (M)** - Modify is used to change current privilege assignments. Note: select all privileges the employee is to be assigned. For example, if employee Jan Jones is currently assigned the Work Pool privilege and needs Logon As Read, a Privilege Request form with an action of "Modify" must be submitted with both the Work Pool and Logon As Read indicated with an X.

**Delete (D)** - Delete is used to remove all assigned privileges. An X does not need to be indicated in any of the columns.

#### Sample

Action (A, M, D)	First Name	Last Name	User ID	UCM Agency Code	Email Address	Work Pool	Travel Advance Administration	Log On As Read	Log On As Write	CalATERS Global Reports
A	Sam	Smith	JS1234	9889		X				
M	Jan	Jones	SJ1234	9889		X		X		
D	Cliff	Coach	SC1234	9889						

Privilege Request forms must be signed by an authorized department representative. Signed and completed forms may be faxed to (916) 324-7270 or emailed to the CalATERS Global Help Desk at [calaters@sco.ca.gov](mailto:calaters@sco.ca.gov). Privilege Request forms will be processed within five business days after receipt of the form.

If you have questions about the privilege request form please contact the CalATERS Global Help Desk at (916) 324-9991



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Department Name: \_\_\_\_\_

Action (A,M,D)	First Name	Last Name	User ID	UCM Agency Code(s)	Email Address	Work Pool	Travel Advance Administration	Log On As Read	Log On As Write	CalATERS Global Reports

**\*NOTE: Employee(s) must be registered in CalATERS Global for privileges to be assigned,  
Department Representative must validate prior to submission.**

Signature of Authorized Department Representative *		Date	
Title		Phone Number	
Email		Fax	

\*Authorized department representative must have a signed Signature Authorization form on file with the State Controller's Office, CalATERS Global Unit.

#### SCO USE ONLY

Task	Analyst	Completed Date
CalATERS Global Privileges		
Actuate Privileges		
Department Notified		